

# WorldAPP Offline HOW TO

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**WorldAPP**

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## What is WorldAPP Offline?

WorldAPP Offline is a mobile application that lets you collect data using web forms and surveys in areas where internet is not available.

## WorldAPP Offline can be accessed through:

- **Mobile application**

iPhones, iPads and iPods can get the app from the [iTunes App Store](#)



Android devices can already get the application on [Google Play Store](#)



- The **Web-app** is available here: <https://www.keysurvey.com/offline/> for Google Chrome and Safari browsers.

## WorldAPP Offline is available for the following devices:

- iPhone 3G, 3GS, 4, 4S, 5S with **iOS5 or higher**;
- iPod Touch with **iOS5 or higher**;
- iPad 1, 2, 3, 4 with **iOS5 or higher**;
- Any devices with **Android 2.3 or higher**.

## Few easy steps to set things up:

- **Set Up** web forms for remote data collection
- **Upload** a list of contacts who be granted access to the offline application
- **Publish** your forms to the Participant Portal
- To collect data offline on your mobile device download the **Mobile app** — or visit [www.keysurvey.com/offline/](http://www.keysurvey.com/offline/) for browser access.

**NOTE:** Please make sure to upgrade the mobile application prior to collecting data.

## STEP 1 Create your form

WorldAPP Offline is a mobile application that lets you access and execute forms and surveys offline that have been previously created inside Form.com or Key Survey tool. Once you have created a form or a survey, the tool itself will indicate whether or not it is compatible with WorldAPP Offline.

In order for a form or a survey to display correctly inside the application, certain requirements must be met.

For example, the following form types cannot be accessed through the WorldAPP Offline:

- **Custom Forms** from Trash folder (or forms deleted even from Trash)
- **Surveys** with any type of Logic
- 360 surveys
- Common-password surveys

**NOTE:** Interactive and regular Piping only works in linear and custom forms.

The features below would not work even if the form becomes available inside the application:

- Show results to respondents
- Redirect Page

**NOTE:** Multi-lingual forms are shown in the default language only.

All other features and functionality will function as intended, along with these multiple plugins:

Also, starting with software release v8.2 the application includes an indication of whether or not the plugin will work in the offline mode:

- Create contact or custom data object\*
- Update contact or custom data object\*
- Interactive Logic
- Circular Progress Bar
- Respondent Id Saver\*
- Score Calculator\*
- Score Calculator Offline
- 3D Matrix Calculations
- Calendar
- Comment Box
- Drag and Drop Ranking
- Exclusive
- Mobile friendly controls
- Predictive Text Input
- Select All Checkbox
- Slider
- Star Ratings
- External JDBC database writer\*
- Logical Remote Data Sender
- Remote Data Sender\*
- Workflow\*
- Responses Signature\*
- GPS Location

\* Functional once results are uploaded to the server

Exclusive

This plugin is used to tag certain answer options of a 'Check all that apply' question as exclusive and disable other options for selecting. Before setting this plugin, add the <exclusive/> tag to the answer option you want to tag as exclusive.

Insert 

Fixed Header for Rate and Matrix Questions

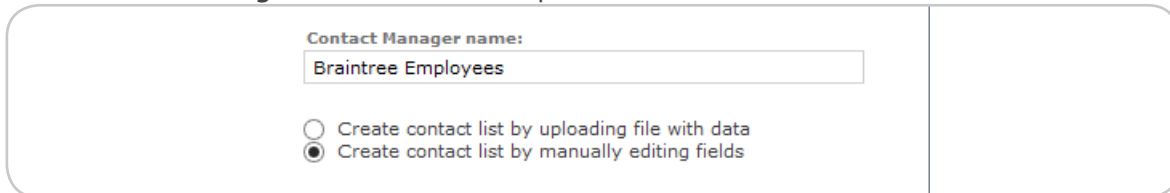
This plugin is used to display answer options for 'Rate along the scale' or '3D Matrix' questions in a scrollable area with fixed height and fixed header. It is commonly used for questions with a long list of answer options.

Insert 

## STEP 2 Setup user logins and passwords

WorldAPP Offline uses contact managers within your account as a database of respondents.

If there is no Contact Manager created in your account yet, go to the Contacts tab on the top left, name it and select one of the methods of database creation. If you already have contact managers created click **New -> Contact Manager** on the same tab and proceed as described below.

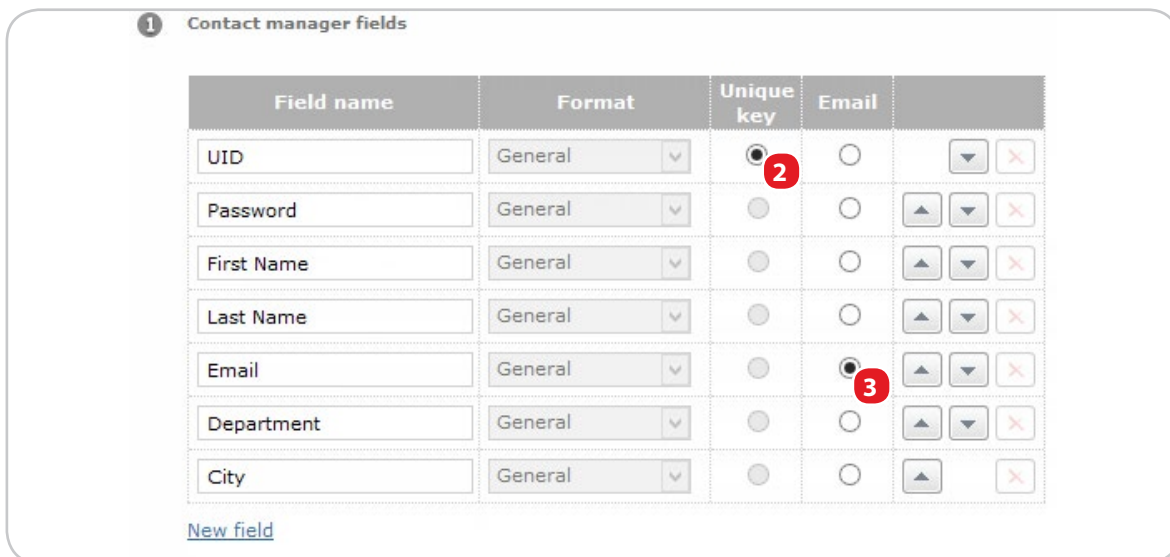


Contact Manager name:  
Braintree Employees

Create contact list by uploading file with data  
 Create contact list by manually editing fields

1. Select the **Create list by manually editing fields** option to add Contact Manager columns manually.
  - The **upload file with data** option allows adding contacts to the Contact Manager in batches. More details on this option can be found [here](#) in our Online Help Guide.

2. Once you have added all the necessary fields, assign any mandatory fields and click Save:

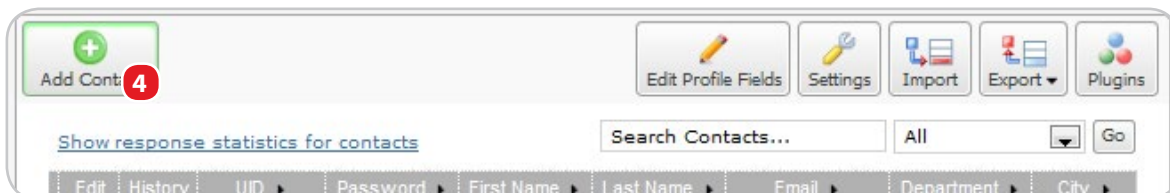


Field name	Format	Unique key	Email
UID	General	<input checked="" type="radio"/> 2	<input type="radio"/>
Password	General	<input type="radio"/>	<input type="radio"/>
First Name	General	<input type="radio"/>	<input type="radio"/>
Last Name	General	<input type="radio"/>	<input type="radio"/>
Email	General	<input type="radio"/>	<input checked="" type="radio"/> 3
Department	General	<input type="radio"/>	<input type="radio"/>
City	General	<input type="radio"/>	<input type="radio"/>

[New field](#)

- **Unique Key** – contact identifier, has to be different for each respondent(2).
- **Email Address** – respondents email address(3).

3. Now click the **Add Contact** button and complete profile data for each user(4):



**Add Contact** 4

Edit Profile Fields Settings Import Export Plugins

[Show response statistics for contacts](#) Search Contacts... All Go

Edit History UID Password First Name Last Name Email Department City

## STEP 3 Publish the form to users

1. Open the **Launch** section of your form or survey and click **Go(1)** next to the **Publish on Participant Portal**.

4 Select survey distribution method and click 'Go'

Email survey distribution	Go
Password survey protection	Go
Upload responses	Go
HTML code	Go
Salesforce.com integration	Go
Publish on Participant Portal	Go <b>1</b>

2. Select needed Contact Manager (2) and list of users you would like to allow accessing the form or survey.

1 Contact Manager:

WorldAPP Clients ▾

- > WorldAPP Clients
- > WorldAPP Employees **2**

2 Change the Group of Contacts Currently 100 contacts selected  
[Manage selected contacts](#)

3 Setup Data Flow

4  Allow only one response per form  
 Allow multiple responses per form  
 With existing responses allow to...  
 Edit  Copy  Delete **3**

Save

5 Survey should be visible on Portal between the following dates:  
 Same as survey start and end date  
 Different dates **4**

Save

6 **Please note**, that once your survey is published to the Participant Portal, the access to the survey via Master URL will be restricted to only those survey participants, who are logged on to the Participant Portal  
 The survey is currently **not published** on Participant Portal

Publish to Participant Portal

3. Indicate and **Save** the response modification rules(3).

4. Specify and **Save** the survey availability date range(4).
5. If you have already created recipient groups in your Contact Manager, select them and click Next. Otherwise, proceed with creating a new group.

Please create a group to select participants for this survey

- Create new group **from scratch**
- Select **existing** group...

6. Click **New filter** and set filters by any criteria to select a list of users that will receive the form once it is launched.

**1 Add filter**

Profile Activity

Email

Select Condition

- Search -

- Aenean.sed.pede@feugiat.org
- Aliquam@mi.com
- Cras.dolor.dolor@estMauriseu.c
- Cras@Curabituretodio.net
- Donec.feugiat.metus@urnaNulla
- Duis.sit.amet@ut.ca
- Duis@semperetlacinia.net
- Integer.urna.Vivamus@element
- Lorem.ipsum.dolor@euismoden
- Maecenas.ornare.egestas@mac

Add >>

<< Remove

Exclude filter

Add filter Cancel

7. The filter can also be set to specified activity criteria.
8. **Save the** created filters.

**1 Add filter**

Profile Activity

Score Exactly %

- Select Filter
- Score
- Number of survey completed
- Status
- Last invitation sent
- Last survey started
- Last completed survey
- Last survey status

Add filter Cancel

## STEP 4 Setup Data Flow

Upon completing the setup of the [data flow](#) functionality, the specified Contact Manager fields will autofill survey questions or the response to the mapped question will be added to the contact manager.

1. Select the question you would like to map.
2. Select the contact manager field you wish to attach.
3. Specify the data flow direction.
4. Apply the configuration.

You are now ready to **Publish to Participant Portal**.

Publish to Participant Portal

## STEP 5 Accessing the offline account

To log into the WorldAPP Offline, your users would need to have Portal ID (1), and their Login and Password.

To define which fields of the contact manager the portal will be using for respondent authentication, select these on the two appropriate menu (2) and click save. Beware, these credentials can only be defined once.

If users from several contact managers will access the portal, then the declaration of the credentials ought to be done for each contact manager. Select each contact manager (3) and repeat the previous step (2) for each of them.

### Step-by-step instructions for respondents

1. Install WorldAPP Offline on your mobile device and launch it: or visit the web version.
2. Enter the six-digit **Portal ID**, your **login** name and a **password** provided by portal owner. Click **Login** button.
3. WorldAPP Offline synchronizes any launched forms and completed responses with the database upon logging in and later if the respective button is clicked.

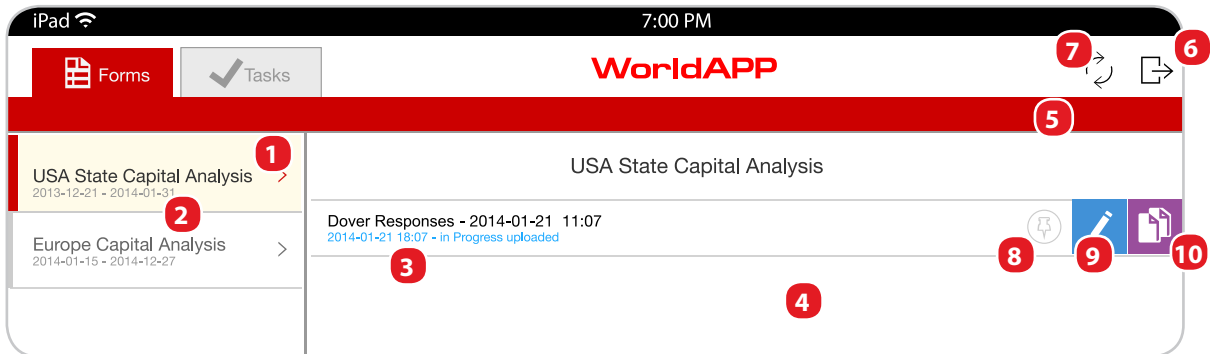
**Note:** During the first synchronization Data Models used in forms are downloaded and made available to you on your device. If they were edited/updated you would need to click Synchronize once again in order to see the changes made.

4. Downloading process starts:

Downloading forms: (16%)

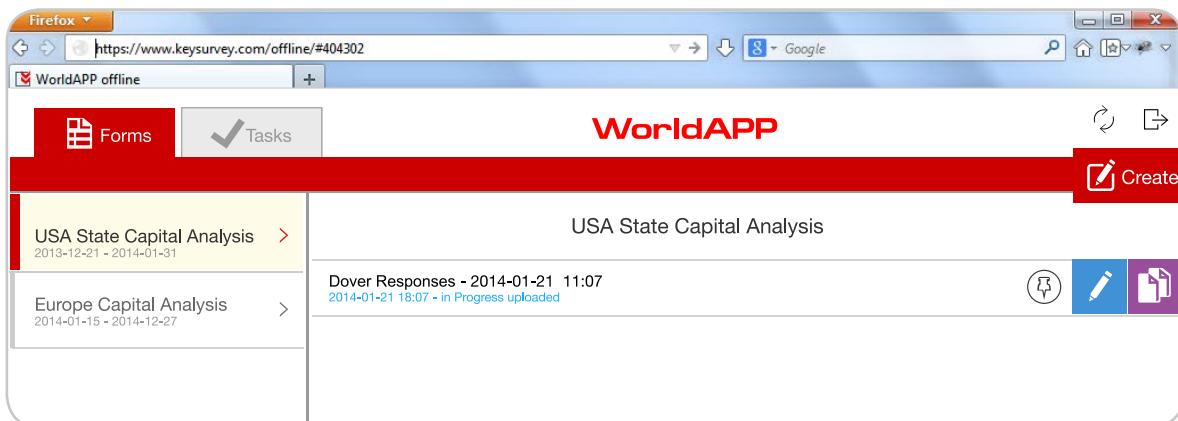
## Offline Forms Functionality

A list of available forms and/or surveys will appear:

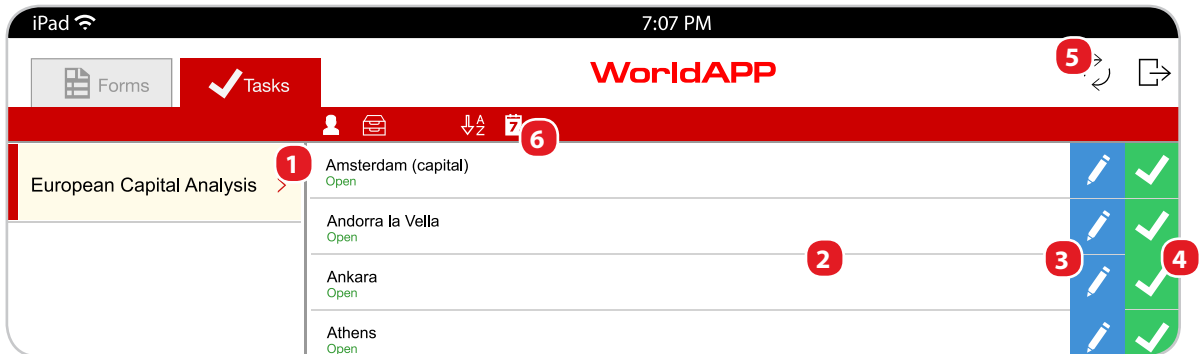


1. Form name
2. Dates when the form is available
3. Date when the response was submitted
4. List of responses for the form
5. Click here to add a new response for the form
6. Click here to Logout
7. Click here to start the synchronization process
8. Click here to save the response on the device
9. Click here to edit the response
10. Click here to copy the response (swipe towards the left near the Delete button)

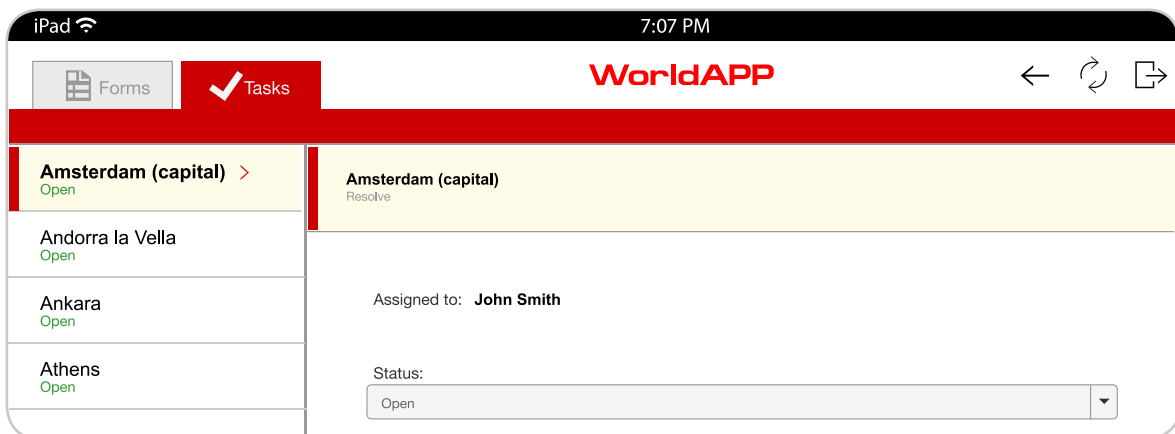
This is a preview of the portal's appearance when accessed from the PC:



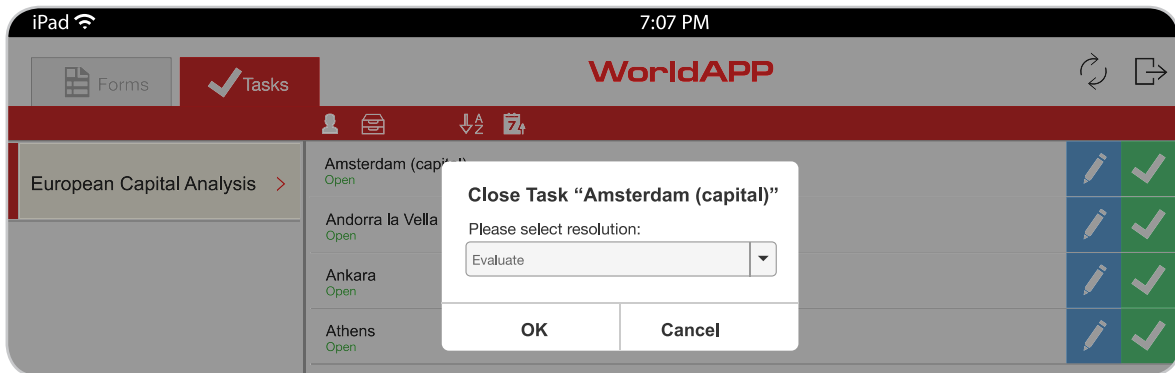
## Offline Task Functionality



1. Task definition
2. List of tasks available to the user
3. Click here to modify the status of the task

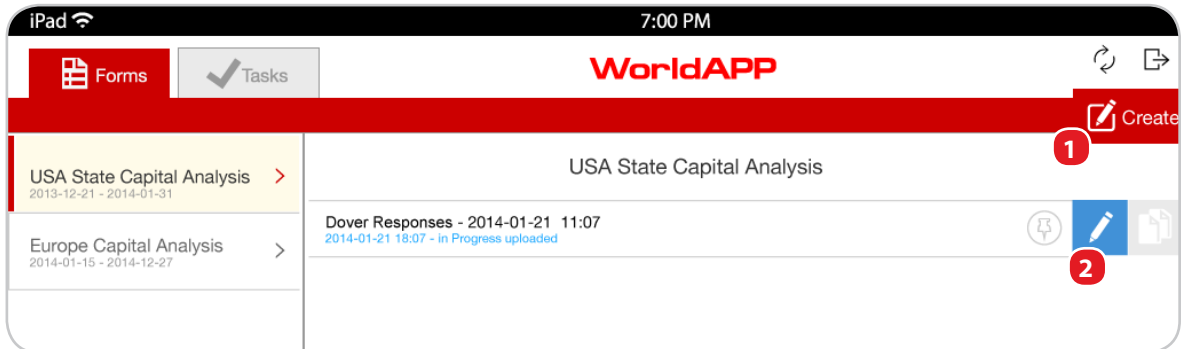


4. Click here to assign a resolution to the task



5. Click here to start the synchronization process
6. Click here to apply sorting by: Open, Closed, Alphabetically and Date accordingly

## Response Section



1. Click the **Create** button in order to submit a new response
2. Click the **Pencil** button in order to edit a response

The survey accessed from a PC will look identical to the survey accessed from a tablet.

